PLEASE READ THESE INSTRUCTIONS BEFORE USING the Education, Health and Care Plan form.

This guidance provides important instructions on how to enter and save information into the CYC Education, Health and Care Plan template. The template has been designed to be easy to use and fully flexible, but to retain a consistent structure to meet the needs of a wide age and ability range. The sections are colour-coded to help you find your way round.

N.B: If you have any queries when working with the document please email sendept@york.gov.uk for support or phone 01904 554320.

Getting started

In order for all functions in the document to work properly, it must be saved as 'Word Macro-enabled Document' (.docm). If you save it as .doc or .docx, there are several functions that will not work. When you open the template, you may get a security warning asking you if you want to enable macros – you will need to click on 'Enable content' before continuing.

This document requires Word 2007 or newer. If you are using an older version of Word, or alternative software such as Open Office, please contact the SEN department (see contact details above) for a basic, non-interactive version of this form.

Before you start completing the form, ensure you download and save the most up to date version of the Education, Health and Care Plan and the different inserts for Parts 1, 2, 4 & 5 from www.york.gov.uk/info/200342/special_educational_needs_and_disabilities/340/special_educational_needs_and_disabilities .

In the following instructions a 'field' refers to the box/space where you type or enter information.

Completing the form

Text shown in grey italics gives instructions for completing that field information. When you type into the fields, your response will be shown in blue text. Where a date is required, you can select it from the drop-down calendar, or type the date in any format (e.g. 1/5/06) and it will automatically be converted to a standard format (usually written in full, e.g. 1 May 2006, except where space is limited).

The child/young person's preferred name is pre-populated throughout the document based on the entry at the top of page 1.

On the contents page, the page numbers are generated by the form, but may need subsequently updating by clicking the Update page numbers and references link at the top of page 2. The date for each section is created by entering a date at the start of each section at the prompt: *This section completed/updated on*: and then updating from the same link on page 2.

The header and footer information is also automatically entered when the personal details on 1.1 are typed in.

 Note: the following fields on 1.1 **MUST be typed in**:

- I like to be known as	- Date of birth
- First name	- Date of this plan
- Surname	- Date of initial plan.

 If you copy and paste these from another document the automatic updates will not work.

Note: in Word 2007, anywhere that the child/young person's name is repeated will have a < at the front of it (e.g. <John), and anywhere that is looking up a date that has not yet been completed (e.g. on the contents page) will be shown as <. This is a due to a bug in Word 2007, and was fixed in Word 2010.

Adding rows and hiding sections

There are some sections where you may need to add more rows in order to give a complete record. Click the + icon to the right of the final row to add an additional row, and repeat as many times as you need. If you find you have added more rows than you need, just leave the surplus rows blank – it's best not try to 'Undo' as this may sometimes cause problems with the form.

There are some sections that will not be relevant to all children/young people. Where that is the case, please enter the date, and answer the question "Is this part relevant?" with No, and then click on Hide this section to remove the remaining questions. You will then get a prompt asking you to confirm whether you want to hide the section. If you hide a section by mistake, you can restore it immediately with the Undo (Ctrl+Z) function. If you later need to restore a section (e.g., you have hidden it by mistake and carried on filling in the form before you realised, or a section becomes relevant that was not previously), go right to the end of the document and click on Restore all hidden sections. You may then want to re-hide parts that remain as not relevant.

Note: Hiding sections relies on "hidden text". If you have hidden characters (such as paragraph marks, spaces and tabs) set to display, "hidden" sections will still display but will be shown with a dotted underline. They will not display when printed. You can turn the hidden character display on/off with the ¶ button on the Home toolbar.

Formatting and inserts

Parts 1.3, 1.4, 2.1, 2.2, 2.6, 4.1, 4.2, 4.3, 4.4, 4.5 and 5.1 are intended to be completed in separate documents by the child/young person (1.3 and 1.4), family (2.1, 2.2 and 2.6), health care professional (4.1 and 4.2), social care professional (4.3, 4.4 and 4.5) and other practitioners (5.1). Copy the relevant rows from the table (i.e. not the coloured row at the top), then switch to the main EHCP, click in the relevant cell, press Enter, then right-click and 'Paste as nested table'. You will need to copy each part separately (e.g. 2.1 first, and then 2.2).

The two inserts for Part 4 will need to be saved as 'Word Macro-enabled Document' (.docm). The inserts for parts 1, 2 and 5 can be saved in that format or as 'Word Document' (.docx), but preferably not as 'Word 97–2003 Document' (.doc) unless there is no other option, as this will lose some formatting and control.

Note: To replace this with an updated insert (e.g. in subsequent years), first save as a new version, select the entire table and press Delete, and then you can paste a new version in.

Note: The child/young person's name will be automatically completed in these inserts when you have pasted them into the main plan and run Update page numbers and references.

For younger children and children and young people with more complex needs there is a separate insert for 1.3 and 1.4. These have the headers from the standard insert listed at the top, but then has a box where pictures, captions and photos or answers to simplified questions can be inserted to illustrate the child or young person's views.

You can copy text from other documents/emails and fields you have completed elsewhere in the form and paste these into text fields. Where the fields are asking for a longer answer, they accept 'rich text', and you can paste content including formatting, pictures and tables. If you are pasting in text from elsewhere, please type in dark blue (Calibri size 12) where possible, or alter the original document to this font, so that it stands out as entered text when copied across. Please note that while these fields will accept formatted text, pictures and tables being pasted in, there is no mechanism to apply formatting or insert pictures or tables within the form – you will need to type them in a blank document and then copy and paste them across. It is best to get the content right in the other document before you copy and paste, as sometimes it is difficult to edit once it has been copied across. (This does not apply when using the template extracts mentioned above, which **do** allow formatting to be applied).

> **Note**: where you are copying text from another document, and the text you are copying is in a table cell, you will need to select and copy *just the text* and not the table cell itself, as this can cause problems when you paste it into fields that accept formatted text. This only applies when you are just copying text, and not the whole table.

Re use of Tab: Some fields allow you to use tab to move to the next field on a page.
Some fields however, because of the way they are formatted, won't do this and will insert multiple spaces instead. Also note that tabbing to a + or Hide this section will bring up the prompt to activate that function, but you can just click 'No' if you don't want to do that.

When the EHCP is completed
Always remember to save as a **'Word Macro-enabled Document' (.docm)** and email to the Local Authority in this format (not a PDF).

The signatures in 6.3 do NOT need to be gathered before emailing the plan to the local authority.

Ensure the completed EHCP is emailed to the SEN department **within 10 days of the Annual Review meeting.**

> **Note**: The local authority will request signatures from the family and/or young person after an Education, Health and Care Plan has been received and agreed by the Education, Health and Care Panel as part of the statutory assessment process. Following annual reviews the local authority will send the educational setting an agreed updated Education Health and Care Plan, signed by the local authority. Educational settings should then add signatures from the family and email a completed scanned copy of part 6.3 back to the authority for their records.
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> **NB** where early settings do not have the facilities to do this they should post a hard copy back to SEN services.